



**Town of Southampton**  
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## ASSESSOR'S OFFICE

### **APPLICATION INFORMATION SHEET FOR:** **PARTIAL TAX EXEMPTION FOR REAL PROPERTY OF SENIOR CITIZENS** **(AND FOR ENHANCED SCHOOL TAX RELIEF (STAR EXEMPTION) RP - 467**

#### **To qualify for the Enhanced and/or Senior Citizens' Exemption program you must:**

- ☐ Own an improved residential property. Seasonal residences are excluded.
- ☐ Declare this property as your primary residence.
- ☐ Fill out and return this form with proof of residency\*, by March 1, 2016.
- ☐ Be at least sixty-five years of age in the year in which you are applying.\*\*
- ☐ Earn \$84,550 or less in adjusted gross household income for the Enhanced Exemption\*\*\*
- ☐ Earn \$37,400 or less in gross income for the Senior Citizens' Exemption. Medical and/or dental out-of-pocket co-pays may be deducted to lower income.\*\*\*
- ☐ One of the applicants must be a recorded owner of a home within New York State for 12 months prior to March 1, 2016.

You are entitled to only one Senior Citizens' and/or Senior Exemption. Approved exemptions will commence with the December, 2016 tax bill.

- \* Proof of Residency: Your voter registration and a copy of the top half of your New York State Income Return showing the school district.
- \*\* Proof of Age: A copy of all owners driver's licenses, birth certificates or passports. For ownership between spouses or siblings only one proof of age is necessary.
- \*\*\* Proof of Income: A copy of the 2014 federal or state tax return, with Social Security Form 1099, if applicable. Call this Office for further details and updated changes in income limits.

#### **YOU MUST MAKE YOUR OWN COPIES OF THE FOLLOWING:** (Do not submit originals)

- 1) Photostat copy of your federal income tax return for calendar year 2014.
- 2) Photostat copy of **SSA 1099** form (SOCIAL SECURITY END OF YEAR STATEMENT).
- 3) Photostat copy of all income and expense statements for 2014 on any (rental) property owned.
- 4) Two-family homes **MUST REPORT** any income or contributions from apartments and names of tenants.
- 5) Photostat copy of statement reflecting any capital gains for 2014 (Sale of property, stock sale, etc.)
- 6) **If you do not file an income tax return.** Photostat copy of all income and/or interest statements for 2014. Please provide proof of **non-filing** from your accountant or your local IRS Center and provide copies of 2014 statements of income such as, wages, savings interest, bonds, pensions, stock dividends, annuities, interest on IRA's or similar plans, etc.)
- 7) Applicants are required to report any contributions toward the household from anyone living on the premises (e.g. family members, friends, etc.). You are also required to list names and ages of anyone residing on the premises (including children or grandchildren.)

**PLEASE STAPLE ALL DOCUMENTS TO THE BACK OF YOUR APPLICATION**  
**INCOMPLETE APPLICATIONS WILL BE DENIED - NO EXCEPTIONS WILL BE MADE**